SAM Release Notes
Build 2016-11-11

November 11, 2016

Change Log

Version #	Date of Change	Section	Description of Change	Changed By
1	09/30/2016	All	Initial Draft	IBM
2	11/6/2016	All	Incorporated GSA Feedback	IBM
3	11/7/2016	Release Notes	Final Version	IBM

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Overview

With each software release, we work to improve the System for Award Management (SAM) user experience, improve the quality of information available from SAM, and reduce the burden for those wishing to do business with the U.S. Federal government. We do this through a combination of minor enhancements and fixing known issues. This document summarizes the customer-facing changes that were made to the SAM application and database in the development window culminating in the build to production on November 11, 2016.

Release Notes

Description	Reference IDs
Enhancements	
Organized the Save Search query page alphabetically improving usability for users with multiple saved searches.	19436
Improved page load times on the Data Access Management section of SAM increasing efficiency for managing data access requests.	21734
Added enhanced search capabilities to the Data Access Management pages in SAM increasing the efficiency for managing data access requests.	21737
Developed dynamic search results messages to display when an entity registration exists matching the search criteria, but the entity did not provide public search authorization. Instead of seeing "No records found for current search" a user will be informed access is restricted to U.S. government users reducing confusion for contracting officers and other Federal users.	25181
Added input verification in the Add Exclusion workflow to check National Provider Information (NPI) for uniqueness increasing data quality.	25511
Added a confirmation page to display when users delete a Work in Progress entity registration record reducing confusion.	27678
Accessibility Enhancements	
Redesigned the Purpose of Registration Page to improve overall usability and increase accessibility for users who rely on screen readers.	28605
Exclusions Management	

Updated the system interface with Dun & Bradstreet (D&B) to better manage the ability to add additional locations to an exclusion record for entities with extremely large organizational hierarchies to improve performance and data quality.	19166
Updated the language in the System Authorization Access Request (SAAR) form for download during the data access request process providing more complete documentation for interfacing systems.	19493
Removed the exclusion file from the Upload Queue in the SAM Exclusion Upload page when the user chooses to cancel the process better managing the supporting technical resources.	26914
Improved usability of the Add New Address feature on the Identification Information page when creating or updating an exclusion record. When selected, the New Address box will display expanded and existing addresses will be collapsed, except for the Primary Address.	27217
Entity Registrations	
Updated the instructions on the Deactivate Entity confirmation pages to provide clarity and consistency.	22815
Updated the search results display when searching by CAGE Code on the Existing Registrations page improving usability.	26841
Added system validation to the Mailing Address field during the Entity Management registration process to require a ZIP/Postal Code when the country selected is Canada.	26956
Updated text explaining mandatory fields in the page description section of Core Data and POC Details pages increasing consistency with the rest of the application.	27514
Updated text on the Entity Review page to provide more clear information to users in the Page Description header and the certification statement at the bottom of the page improving usability.	27516
Clarified the description and destination of the hyperlinks on the Before You Start fly out improving usability.	27520
Added a sub-header to the Delete Incomplete Record page increasing heading consistency and accessibility.	27677
Fixed an issue so deactivated registrations will no longer display on the Existing Entity Registrations page for Help Desk users improving user support.	27950

Updated the title text for the Small Business Administration (SBA) Dynamic Small Business Search (DSBS) link on the Entity Registration page making it consistent with accessibility best practices.	28228
Manage Entity Core Data	
Replaced the Information Opt Out page with a new SAM Search Authorization page. Updated the language, design, and logic to encourage inclusion in SAM public search and better explain why an entity would opt out of the public search.	18159
Clarified the Commercial And Government Entity (CAGE) Code fields on the Entity Review pages, displaying CAGE for domestic registrations and NATO CAGE (NCAGE) for foreign registrations improving usability.	21185
Updated the application to prevent users from entering a Taxpayer Identification Number (TIN) on the Business Information Page until the TIN Type is selected improving data quality.	24733
Enhanced the Core Data section so the Congressional District field for an entity not located in the U.S. or its territories will display as "Not Applicable" reducing confusion and improving usability.	27054
Updated error message on the Ownership Details page to give better guidance when users provide a CAGE Code less than 5 characters in length improving usability.	27065
Updated the page description on the Proceedings Questions page to clarify the response criteria and provide more detailed instructions improving usability.	27521
Manage Entity Assertions	
Removed disaster response field information on review pages and in the PDF if user declines to participate in the Disaster Response Registry simplifying the presentation.	17429
Updated and aligned the Goods & Services column headers on the entity review pages improving the look and feel.	22757
Manage Entity Reps & Certs	
Updated the logic for FAR 52.204-3 Taxpayer Identification to display the proper type of organization both on-screen in the application and in the PDF when the entity is a U.S. Federal, state, or local government entity improving consistency of data presentation.	25882

Fixed an issue causing user responses to the representations and certifications to not display in the PDF for entities where an older, inactive registration had the country as Guam improving consistency of data presentation.	26121
Fixed an issue where the PDF was not matching the application to indicate Taxpayer Identification Number (TIN) on file when an entity is foreign owned and provides a TIN improving consistency of data presentation.	26798
Updated the Representations & Certifications acknowledgement statement to more clearly explain consequences of false representation to the government.	27517
Manage Entity Users	
Disabled the ability for Help Desk users to view non-federal, deactivated entities on the Entity Users pages in order to prevent them from assigning roles to non-federal deactivated entities improving user support.	13508
Fixed an issue where duplicate roles were being displayed under the Manage Roles page reducing confusion and improving usability.	14049
Added validation to the Help Desk administration workflow to prevent password resets for deactivated users by selecting the "Reset Password" button improving user support.	26968
Fixed an issue where Tier 1 Help Desk navigation links persisted for disassociated Tier 1 Help Desk users improving user support.	27006
Fixed an issue where a Tier 3 Help Desk user could not reassign the Tier 1 Help Desk role to a user account that was previously disassociated improving user support.	27007
Added Loading indicator on the User List page to signify that the application is searching for a user improving usability.	27942
Fixed an issue where certain entities were not searchable on the Manage Roles page when trying to assign roles to users improving usability.	29050
Manage User Account	
Fixed the format issue on the User Roles Details and Entity List boxes improving the page look and feel.	22708
Added a Loading indicator to the Manage Roles page so that users know when the application is searching for roles improving usability.	22752
Improved the performance on the Manage Roles page so that users may more easily search for entities and assign roles improving usability.	28191

Fixed an issue preventing users from requesting a role with an entity where the most recent version of the registration was a deleted Work In Progress (WIP) record improving usability.	28391
Search Records	
Updated Quick Search to not be case sensitive improving usability.	27751
Fixed an issue where the "Clear Search" button was not clearing the main navigation search bar on the Search Records page improving usability.	28229
Data Access Management	
Added the ability for SAM Help Desk and GSA Data Approvers to view approved and rejected data access requests improving request management efficiency.	21652
Updated the page text on the Pending Requests page in the Data Access Management section of SAM improving usability.	21874
Updated page text on the Individual Data Access Record page in the Data Access Management section improving usability.	21875
Update "Declined" to "Rejected" on the Manage Data Access > Individual Data Access Record Page clarifying request status.	21877
Updated the page text in the System Data Access Records page in the Data Access Management section of SAM improving usability.	21880
Added the SAM system account system name to the display on the System Data Access Records page improving request management efficiency.	21881
API	
Refined the two-step process to calculate the Congressional District when a ZIP+4 is not present in the registration increasing data quality.	28540
Web Service & Extracts	
Changed the file name and hyperlink for the Sample Extract Calendar making it easier to update the file in the future.	22650
Site-Wide	
Added field-level SAM Assistant for the State/Province dropdown boxes when completing an entity registration improving usability.	22200
Blocked access to the System for Award Management (SAM) for anyone navigating via Internet Explorer 8 or earlier improving security.	23214

Updated the Dun and Bradstreet (D&B) Limitation of Permissible Use disclaimer language to better explain expanded data rights for D&B Open Data.	29353